United Nations

Food and Agriculture Organization
of the United Nations

ECE/TIM.INF/10

ECONOMIC COMMISSION FOR EUROPE
TIMBER AND FOREST INFORMATION SERIES

UNECE TIMBER COMMITTEE YEARBOOK

2003

UNITED NATIONS

United Nations Economic Commission for Europe
Food and Agriculture Organization
of the United Nations

Timber Section,
Geneva, Switzerland

ECE/TIM/INF/10

TIMBER AND FOREST INFORMATION SERIES

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UNITED NATIONS
New York and Geneva, 2003

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ABSTRACT

The aim of the *UNECE Timber Committee Yearbook 2003* is twofold: to provide an overview of the Committee's activities, and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. Further information about the publications or any other aspect of the Committee's work may be obtained from the secretariat:

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THE UNECE TIMBER COMMITTEE YEARBOOK 2003

Table of contents

Page

Preface iv

I. THE TIMBER COMMITTEE'S ACTIVITIES IN 2002

1. Promotion of sustainable forest management in the region 1
2. Forest policy and institutions 1
3. Forest Resource Assessment 2
4. European Forest Sector Outlook Studies 3
5. Forest products markets 3
6. Forest Technology, Management and Training 5
7. Partnerships in forestry 5
8. Afforestation in the context of sustainable forest management 6
9. Assistance to countries in transition of central and eastern Europe

   ECE Timber Committee Technical Excursion to the Federal Republic of Germany 6
10. ECE/FAO Forest Communicators Network 8
11. Forest certification in the UNECE region 8

II. ACTIVITIES PLANNED FOR 2003 AND 2004 10

III. BIBLIOGRAPHICAL REFERENCES 14

IV. LIST OF MEETINGS IN 2003 AND 2004 17

Some facts about the Timber Committee 19

UNECE/FAO Timber Branch publications 20

PREFACE

The UNECE Timber Committee contributes to the promotion of sustainable development of the forest and timber sector by addressing all its aspects: economic, ecological and social. The purpose of the *Yearbook* is to make this wide range of activities better known and well used. Its activities contribute to this goal by providing information, analysis, and a forum for policy discussion as regards forests, markets, and institutions. Among other activities, indicators are developed on sustainable forest management and the needs of countries in transition in central and eastern Europe are monitored and analysed. A major study on the outlook of forestry in the region and its implications is currently under way.

The *UNECE Timber Committee Yearbook 2003* is intended to disseminate the information on the Timber Committee's activities among those for whom it would be most useful – officials and experts in the fields under consideration.

Mrs. Brigita Schmögnerova
Executive Secretary
UN Economic Commission for Europe

I. THE TIMBER COMMITTEE'S ACTIVITIES IN 2002

1. Promotion of sustainable forest management (SFM) in the region

Promotion of SFM is the over-riding objective of the whole programme and all outputs contribute to this strategic goal, notably by improving the quality and scope of information, analysis and exchange available to the regional forest policy dialogue. However, some aspects should be stressed, as more direct contributions to this general objective.

One highlight is the intense participation of ECE/FAO in the regional forest dialogue, notably in the framework of the Ministerial Conference on the Protection of Forests in Europe (MCPFE). This cooperation took multiple forms:

- Coordination of work on forestry assistance to countries in transition and data on forest fires, in accordance with mandates form earlier ministerial conferences (reported under section 9 below)
- Supply of data on state of Europe's forests for the ministerial conference in 2003
- Participation in revision of pan-European indicators of sustainable forest management, using experience gained with forest resource assessment work.
- Contribution to redefining protected and protective forests and collecting data on them, using new and more realistic concepts.
- Furthering work on the social dimension of sustainability, for instance through work on participation and partnerships.

The forest sector outlook study (see section 4 below) is a major contribution to analysing sustainability over the long term, identifying policy options and their possible long term consequences, as well as cross-sectoral policy interactions.

Sector institutions are an important component of sustainability, and national forest services have been going through a period of major changes, not only in transition countries but also elsewhere. They are expected not only to further the public interest, but in many cases to act as quasi-private (or in a few cases, private) entities, following market rules and achieving high standards of efficiency. Three workshops have been held under ECE/FAO auspices to share experience on these major changes. The latest was in September in Ireland (see section 9 below).

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2. Forest policy and institutions

ECE/FAO monitors and analyses recent trends in policy and institutions. The European Forestry Commission at its session in Barcelona, collected information on this which will be published in early 2003. Drawing on a detailed review of developments it identified and articulated for transmission to the global level (FAO Committee on Forests), regional policy concerns.

In the opinion of the EFC, the major issues confronting policy makers for the forest sector were the following:

Promoting the sound use of wood as sustainable and environmentally friendly both as a renewable source of energy and raw material.

Fostering economically viable forest management.

Maximizing forestry's contribution to rural development and poverty alleviation.

Developing the role of forests and wood in a climate change strategy.

Fostering conservation of biological diversity through sustainable forest management.

Managing forested watersheds and water sources.

Promoting good governance in the forest sector inside and outside the region.

Adapting forest institutions to changing circumstances such as restitution of forest land, privatization of forest industries and devolution of responsibility for forests.

Enhancing the range of human resource capabilities to implement sustainable forest management.

The EFC also reviewed the information needs of the regional and global forest dialogues, and made a number of recommendations to avoid duplication and improve information quality.

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3. Forest Resource Assessment (FRA)

The regional FRA activities had been concentrated during the reported period on the implementation of the ECE/FAO parent bodies' decisions relating to the FRA-2000 follow-up, and opening the preparation for the next forest resources assessment cycle. The most recent and best available FRA data were provided to the MCPFE Liaison Unit Vienna. The supplied information included more than 20 tables of the latest FRA statistics, as well as the analysis of this information (a sort of mini-TBFRA), which will constitute an important part of the reporting to the Ministerial Conference on the "*State of Europe's forests*". ECE/FAO contributed also to the review in 2002 of the original set of MCPFE indicators for SFM on the basis of experience gained in the TBFRA process. The new guidelines for protected and protective forests and other wooded land in Europe were elaborated on the basis of the analysis of national data reported in the process of the regional FRA-2000.

The ECE/FAO FRA-2000 information, which is posted on Internet at the ECE Timber Committee website (*http://www.unece.org/trade/timber/fra*) has taken one of the leading positions in UNECE according to "hits", "downloads" or "visits" during the last years. The ECE/FAO FRA-2000 database and main report were downloaded over 10,000 times. The meeting of the UNECE team of specialists on forest resources assessment, held in May 2002 in Krakow (Poland), reviewed the regional FRA work and discussed the directions of future activities in the temperate/boreal forest resources assessment.

The further ECE/FAO regional forest resources assessment work will strongly depend on the outline of the next round of the global FRA which, in its turn, will be based on the proposals elaborated by the "Kotka-IV" expert consultation (Finland, July 2002), and recommendations of the first meeting of the advisory group on the global FRA (Nairobi, October 2002). The future FRA work will be even more closely integrated into the international processes on Criteria and Indicators (C&I) for Sustainable Forest Management (SFM), and into the MCPFE process specifically, as far as the ECE/FAO is concerned.

The structure and governance of the global forest resources assessment should outline modalities and directions of the future regional FRA. The global FRA strategy will also influence the scope and organisation of the ECE/FAO forest resources assessment, which is expected to be complementary to the global FRA. A more definite structure of the next global FRA is expected to be available by mid-2003. The intensive communication with countries and partner organisations will be the key element of the forest resources assessment work.

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4. European Forest Sector Outlook Studies (EFSOS)

The Timber Branch has been actively working on the European Forest Sector Outlook Studies (EFSOS) over the last year, whereas the main objective of this project is to analyse the future possible developments of the forest and forest industry sector in Europe, including central and eastern European countries.

The work significantly progressed in all major EFSOS issues: the historical analysis of driving forces, the outlook for timber markets and forest resources, major case studies and some new projects. The major focus is now on the flagship publication, which aims to provide an overview of the outlook for the long-term development of the forest sector, with various assumptions about future changes in the market and policy framework. Particular attention has been paid to the progress of eastern European countries towards market economy, the dynamic growth of production and trade in these countries as well as to environmental policies, with possible implications for forestry land use and the utilisation of wood in Europe.

The secretariat has put a special emphasis on the policy orientation of the EFSOS programme, providing the outcomes of a special forest sector policy study in preparation for the next Ministerial Conference for the Protection of Forests in Europe in 2003.

The EFSOS Team of Specialists, the UNECE Timber Committee and the FAO European Forestry Commission recognised that combining the knowledge, skills and capacities of a large group of forest sector outlook study experts is essential for the success of EFSOS both in terms of quality and keeping deadlines.

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5. Forest products markets

Highlights of the 2001-2002 markets

The following highlights are findings of the *Forest Products Annual Market Review, 2001-2002* which are further elaborated in the publication (they are also available on the Committee's website).

Viable forest products markets, supported by policy reforms, underpin sustainable development in some central and eastern European countries' forest and forest products sector, as evidenced by their having become significant players in international forest products markets.

Following 10 years of growth, consumption of primary-processed forest products in the UNECE region declined sharply in 2001, falling by 3% overall, the greatest one-year drop since the1970s oil crises and 1990s break-up of the USSR.

In contrast to developments in the other subregions of the UNECE region, consumption of wood products in the Commonwealth of Independent States (CIS) subregion, notably the Russian Federation, gained 7% in 2001, approximately the same as in 2000.

Due only to the extraordinary strength of the United States housing-related demand for wood products, the North American subregion did not sink to further depths in 2001.

Consumption of sawnwood fell in the UNECE region in 2001, by 4% for both softwoods and hardwoods; United States production decreases opened the door for increased imports from Canada, despite continuing trade disputes, and European countries as well as for growing volumes from southern hemisphere, plantation-based suppliers.

Market effects from Europe's catastrophic windstorms in late 1999 continued to influence wood raw materials and some primary processing sectors in 2001.

Influenced by a strong dollar in 2001, trade patterns and competitive positions will change in 2002 with the fall in value against the euro and the yen.

Structural change is occurring in United States and western European furniture manufacturing as production decreases rapidly, replaced by imports from central and eastern European and developing, including tropical, countries.

Certified forest product markets grew exponentially in 2001, but remained small compared to certified forest area, which surged to 124 million hectares in mid-2002, of which 90% is in the UNECE region.

Due to industry restructuring, and demand in construction, furniture and flooring, panels markets continued to expand in 2001, achieving new production records for oriented strand board (OSB) and medium density fibreboard (MDF).

Cross sectoral policy issues directly influence the forest products sector and both market stakeholders and policy decision makers must be aware of their current and future consequences.

Highlights of the 2002-2003 markets

The UNECE Timber Committee analysed the market situation in 2002 and forecast markets in 2003 for certified forest products, sawnsoftwood, sawn hardwood, wood-based panels, paper, paperboard and woodpulp and wood raw materials. Key points from the statement are summarized below.

Following record levels in 2000, a downturn in forest products markets occurred in 2001 in the UNECE region. As weak economic conditions in North America and Europe persist in 2002, only a few forest product sectors show signs of an upturn.

Central and eastern European countries and the CIS however, generally forecast rising consumption, production and trade of forest products.

A slight improvement for the entire region is forecast for 2003, although recent economic indicators add uncertainty to the forecasts.

The Committee encouraged countries to work together to achieve the maximum benefits of their efforts to promote wood. Promoting the sound use of wood is important to maintain and increase wood's market share.

International approaches to wood promotion are important to ensure sustainable markets, which are a vital component of sustainable forest management.

Driven by favourable policies, significant European markets and trade of wood biofuel exist, stimulating competition for wood raw material.

The complete text of the Committee's market statement may be found on the website and in the *Timber Bulletin* issue titled "Forest Products Markets in 2002 and Prospects for 2003."

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6. Forest Technology, Management and Training

The Joint Committee on Forest Technology, Management and Training held its twenty-fourth session in Ireland in September 2002. It reviewed the international dialogue on forests, notably the Ministerial Conference for the Protection of Forests in Europe (MCPFE) and activities of other international organizations of relevance to the Committee. The important role of the Joint Committee in the cooperation between the MCPFE and UNECE, FAO and ILO was pointed out. The Joint Committee had not only provided essential input to the preparation of Lisbon Resolution L1, but also contributed significantly to the implementation of the MCPFE Work Programme. Some of the topics expected to be addressed by the Fourth Ministerial Conference to be held in April 2003 in Vienna are included in the Joint Committee programme of work, and therefore suitable for the future cooperation between both bodies – economic viability of forest management, biodiversity conservation and cultural dimension of sustainable forest management.

The following special topics were presented: Sustainable forest management in Ireland; Successful safety and health campaigns - the examples of SUVA in Switzerland and of the extension for private forest owners in Slovenia; and Best practices in forestry contracting - European Network of Forestry Contractors.

The Joint Committee reviewed recent achievements and developments in its field of interest. It agreed to start work on the following new activities: New roles and modes of operation of State Forest Services, Close to nature forestry, Forest operations improvements in farm forests, Traditional forest knowledge, Role of contractors in forestry, and Labour shortage and problems in acquiring a competent workforce. Further information on up-coming activities is presented in section II of this publication as well as at its website: <www.unece.org/trade/timber/joint-committee>.

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7. Partnerships in forestry

The FAO/ECE/ILO seminar on Partnerships in Forestry was held in Brussels in June 2002, at the invitation of the Government of Flanders, Belgium. The seminar addressed the challenges facing the forestry sector today and was a response to the call by the Third Ministerial Conference for the Protection of Forests in Europe in Lisbon 1998 to communicate better and to build partnerships, in particular with groups outside the forest sector. Partnerships were seen as a vital means to cope with the growing demands on forestry. The objective is that they may be able to mobilize resources for a sector with dwindling political and economic importance. The seminar was structured around four themes: partnerships in forest policy, in timber production, in the delivery of non-wood goods and services and in employment creation and rural development.

While participation is about decision-making and hence about governance, partnership is about implementation. Partnerships increase the knowledge and resources available to attain forestry objectives. They give access to expertise and creativity not available to the partners individually. Partnerships within the forestry sector increase competitiveness quality, productivity, image and market position. While little analytical work has been done on partnerships in forestry, it is clear that meaningful partnerships require significant cultural changes in the forestry sector. Information gaps about opportunities, institutions, modalities and potential partners constitute a major obstacle to a wider use of partnerships in forestry. Resource constraints are a significant barrier for small firms and organizations to enter into partnerships.

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8. Afforestation in the context of sustainable forest management

The FAO7ECE/ILO seminar on Afforestation in the Context of Sustainable Forest Management was held in Ireland in September 2002. The seminar made the following recommendations:

- All afforestation activities should embrace the six criteria of **SFM** as stated within the context of the Ministerial Conference on the Protection of Forests in Europe.
- The difference between the concept of SFM and the certification process should be clearly understood.
- Expansion of afforestation activities must be guided by forest **strategic** plans and conform to a code of best forest practice or similar guidelines.
- Afforestation strategies should be integrated with a marketing and industrial development plan.
- The increasing contribution of forest plantations to the production of a renewable and versatile resource should be recognised.
- There is an urgent need to examine more effective ways to foster **communication** between the general public, NGOs and the forestry sector, working towards the common goal of SFM.
- Consultation and effective mechanisms for **participatory decision-making** at the regional and local level are essential if afforestation is to be accepted by all stakeholders.
- Indicative Forest Strategies (IFS), which analyse opportunities and constraints to identify suitable areas for forestry, are a useful method for engaging with stakeholder groups to identify the most appropriate location and composition of new forests. It should be jointly led by the Forest Authority and the Local Authority. IFSs should be implementable, and not aspirational.
- Work already underway on the mutual recognition of forest **certification** schemes by the FAO and other organisations should continue and be accelerated. Certification schemes need to incorporate the needs of small forest owners who may be unable to meet the costs of certification.

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9. Assistance to countries of central and eastern Europe in transition - ECE Timber Committee Technical Excursion to the Federal Republic of Germany

The ECE/FAO continues to monitor forestry activities in countries in transition of the region in line with the corresponding MCPFE Resolution H3. This monitoring is carried out mainly by means of the electronic database, elaborated and developed by ECE/FAO as a key tool in this area and organised on a project-by-project basis. The aim is to improve transparency and increase exchange of information

between countries in transition and between donors and recipients of assistance, in order to maximize synergies, and to encourage activities, which are targeted to the priority needs of those countries. This work is being done with direct input from national correspondents. It is supported by the UN-ECE/FAO Team of Specialists on Countries in Transition, which provides periodic expert review of the situation and needs of the countries concerned.

The H3 database has been in 2002 in the process of electronic upgrading. The new structure of the database will be set up and posted on the Timber Committee website in 2003. The database reflects the bilateral and multilateral work on assistance and co-operation with CITs' forestry and forest product sectors. This work is going on at different levels (local, regional, sub-regional) and implemented by many institutions and organisations. Although the database coverage is not yet comprehensive, it includes more than 650 projects of assistance and cooperation reported by donor and recipient countries and organisations. The majority of them respond to the priority needs of the transition countries, as identified by the ECE/FAO Team of Specialists, namely: institution building, including legal and policy infrastructure, and development of market-oriented and ecologically-sound enterprises.

The more detailed Interim Report on the cooperation with countries in transition in the forestry and forest products sector and the implementation of the MCPFE Resolution H3 (status report 2002) had been prepared during the reported year. It will be published in 2003 and made available at the MCPFE-2003 Conference. The Timber Committee secretariat will continue the implementation of its mandate as the international coordinator for Resolution H3 on forestry cooperation with economies in transition.

- Changing Role of State Forests: Benchmarking in Forestry

The conference on Changing Role of State Forests: Benchmarking in Forestry – its role and potential", was hosted by Coillte Teoranta (State Forest Board) in Bunratty (Limerick, Co. Claire), Ireland. It was the third workshop on the theme in the series, and it had definitely succeeded in accomplishing its tasks and achieving goals. The discussions had shown that the Conference had "matured" and reached the phase of addressing the very practical issues of the State Forestry. The representatives of France invited the next workshop on the subject to be organized in 2003.

- ECE Timber Committee Technical Excursion to the Federal Republic of Germany

Another event, which contributed to the developments in the forestry sectors of CEEC was the technical excursion to the forestry and timber industry enterprises of Germany, and organisation of the seminar "*Forestry and forest industry in the new Länder - a decade after reunification*". The participants discussed policy issues, privatisation, markets and trade between Germany and Eastern Europe. They were given also an opportunity to address the topic in-depth by visiting a privatized forest enterprise, a large sawmill and value-added processing units (laminated floors and pre-fabricated houses). The technical excursion in Germany was a very useful and successful event, confirming the interest of countries in ECE/FAO work in this area.

10. ECE/FAO Forest Communicators Network

The FAO/ECE Forest Communicators Network, formally the FAO ECE Team of Public Relations (PR) Specialists in the Forest and Forest Industries Sector, met in Latvia in May 2002. The meeting was held in conjunction with a "Train the Trainers" Programme according to the suggestions to proceed with PR capacity building in central and eastern European countries initiated in 2001. The objective of the programme was to have participants learn skills in strategic communications planning and provide them with tools with which to train others. Among the topics covered during the workshop were: the Importance of Strategic Communications; Strategic Communications Planning; Environmental Organizations and Forest Communications; Communications Planning Model - Implementation, Tools; Managing the Planning Process; Balancing Priorities; Low cost or no cost research; Image of Forest-Based Industries; Public Participation in Forest Sector, Latvian Experience; Stakeholder Relations; Forest Related Media View; Media Relations and News Releases; and Issues management.

The Forest Communicators Network's goal is to promote a positive image of the forest sector, including all phases of forest management and the forest-based industries. The meeting focussed on:

- Building capacity in central and eastern European countries
- Conducting European Forums for Forests and Society
- Maintaining cooperation with other UNECE Timber Committee and FAO European Forestry Commission teams of specialists and the Joint FAO ECE ILO Committee
- Expansion of the network
- Creating a compendium of best PR practices
- Establishing information on consumer behaviour

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11. Forest certification in the UNECE region

Forest Certification Update for the UNECE Region, Summer 2002 is the fifth in series of *Geneva Timber and Forest Discussion Papers* to present developments in certification of sustainable forest management in the UNECE region of Europe, North America and the Commonwealth of Independent States. This update from summer 2002 has chapters on developments in the major international certification systems, mutual recognition between systems, preconditions and drivers for forest certification, status of forest certification, status of the marketplace for certified forest products, future developments and a list of references.

The area of certified forests in the world has grown considerably over the last year, reaching about 124 million hectares by mid 2002, of which over 90% is in the UNECE region composed of the Commonwealth of Independent States, Europe and North America. The certification landscape includes the vital marketplace link, and the necessary steps to ensure that certified wood products eventually achieve their goals. Like the certified forests, those markets demanding certified forest products are also currently within the UNECE region.

The UNECE Timber Committee follows the market developments for certified forest products and this paper updates the developments in the region and shows current, objective information regarding the status of certification of sustainable forest management and their impacts on forest products markets.

II. ACTIVITIES PLANNED FOR 2002 AND 2003

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

The Timber Committee's annual session

The Timber Committee meets annually generally in Geneva. Its session in 2003 will be held from 7-10 October. The main items on the agenda are: international dialogue on forests, support to the global and regional processes; international cooperation; forest products markets review of recent developments and prospects in the coming year; review of activities of its subsidiary bodies and of meetings held over the previous year under joint auspices. The Committee will also initiate a new strategic review process of its programme.

Technical Excursion to Portugal

A technical excursion will be organised in Portugal in May. The theme, exact dates, full programme and registration form for intending participants will be posted at the Committee's website.

Statistics

The Committee will continue to publish its regular statistics in the *Timber Bulletin*, on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

Forest products markets

Other issues of the *Timber Bulletin* will contain the Committee's regular review and analyses of short-term developments in forest products markets. The annual forest products market review covers trends in the previous year and is published in July/August. The results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year, are issued in November.

. Forest Economics and Statistics

The FAO/ECE Working Party on Forest Economics and Statistics meets yearly. It will hold its twenty-fifth session in Geneva from 24 to 26 February 2003. It will review the European Forest Sector Outlook Studies (EFSOS), Forest Resource Assessment, Market analysis and forecasts and collection and dissemination of statistics and interorganization cooperation in this field.

Assistance to countries in transition of central and eastern Europe

At its annual sessions the Committee reviews its programme of assistance to countries in transition on the basis of recommendations of the team of specialists to ensure that it fulfils the expectations of this group of countries. The meeting will be held in conjunction with the workshop on forests and forestry in central and eastern European countries, the transition process and challenges ahead.

Country profiles on transition countries of central and eastern Europe will continue to be published.

Seminar on strategies for the sound use of wood

The Seminar is being organized under the auspices of the UNECE Timber Committee and the FAO European Forestry Commission and in co-operation with the Romanian National Forest Administration.

Title: **Seminar on strategies for the sound use of wood**

Date: 24-27 March 2003
Location: Poiana Brasov, Romania

Objectives: The objective of the seminar is to place sound use of wood and sustainable patterns of consumption in the wider context of sustainable development, and explore possible policy options, for governments and other stakeholders. It will also address, from the sustainability perspective, certain complex issues related to consumption and markets, including life cycle analysis, promotion of wood, certification and chain-of-custody, communication with, and education of, the public, trade and environment issues.

So far, the international dialogue on forest has focused on the "upstream" aspects of sustainable forest management, although many major policy statements, including the Rio "Forest principles", the IPF/IFF proposals for Action and Lisbon resolution L1, have also mentioned downstream issues linked with markets, consumption and trade.

Target groups: The seminar is open for all persons working with or in forests, forestry and forest industry. Experts from the UNECE member states and other UN countries may attend. For this seminar attendance by experts in the following fields is desirable: forest sector policy, wood promotion, life-cycle analysis.

Forest technology management and training

The Joint FAO/ECE/ILO Committee and its Steering Committee meet in alternate years. The Steering Committee will hold its sixteenth session from 12-13 October 2003 in Zvolen, Slovakia. The Joint Committee will hold its twenty-fifth session in September 2004 in the Netherlands in conjunction with the seminar on new roles and modes of operation of Forest Services.

More complete information on the Joint Committee activities can be found at the website: www.unece.org trade timber joint-committee. The following seminars and workshops will be organized in 2003 and 2004 under the auspices of the Joint Committee:

Title: **Conference on Forest Fire Management and International Cooperation in Fire Emergencies in the Eastern Mediterranean, Balkans and Adjoining Regions of the Near East and Central Asia**

Date: 15-19 April 2003
Location: Antalya, Turkey

Objectives: The Eastern Mediterranean Region, including the Balkan countries, the ECE member states of the Near East and Central Asia, and other neighbouring countries of Central Asia, have recently suffered major forest and other wildland fire problems. The causes of an increasing occurrence of wildfires in forests and other wildlands, including the underlying reasons for increasing human-caused fires, vary within the region and are due to:

- transition from centrally planned to market economies
- national to regional conflicts, creation of new nations
- increasing population growth and land-use pressure
- regional climate change towards increase of extreme droughts

It has been recognized that no regional activity is underway to establish cooperation in wildland fire management, including wildland fire science.

The objectives of the conference are to provide (a) a forum in the Eastern Mediterranean, Balkan and adjoining Regions of the Near East and Central Asia, (b) prepare mechanisms for information and resources exchange in forest and other wildland fire management within the region, including the establishment of partnerships for joint activities in fire research, training and policy development, and (c) prepare proposals to governments and international organizations of the region to establish mechanisms for sharing resources in large fire emergencies in accordance with existing international procedures..

Target groups: The seminar is intended for all persons working with or in forests, forestry and forest industry. Experts from ECE and other UN countries may attend the conference.

- Forest policy makers, Forest service officials and Forest managers
- Forest industry
- Environmental and other non-governmental organizations
- Representatives of local governments
- Researchers and educators

Title: **Workshop on forest operations improvements in farm forests**

Date: 9-14 September 2003
Location: Logarska dolina, Slovenia

Objectives: The workshop will offer the opportunity to exchange experiences and information on the state of the art of knowledge for the improvements of forest operations in farm forests considering in particular cost efficiency of operations, environmental impacts, the social dimension in terms of employment and income as well as contribution to rural development. The role and importance of farm forests in overall forestry, rural and regional development should be analysed and challenges such as market competitiveness of products in a growing global economy and continuing process of urbanisation be recognised.

It will, furthermore, discuss issues of sustainable forest operations and improved utilisation using existing low-cost farm equipment as well as new approaches in the field of farmers' co-operation with industrial forestry, wood processing industry, wood-based energy sector as well as with contractors. Attention will be paid in particular to the reduction of the environmental impacts and wastes, assessment of the importance of forest operations in supporting agriculture based farming activities, the farmers partnership in the field of forest operations, the role of wood processing and its marketing, interference between farm-forest operations and the urban society, the role of self-employment, and the evaluation of decision support systems for alternative machine combinations, aiming to increase the economics of operations and reducing the overall costs with the special emphasis on conditions in countries in transition to market economy and their future role.

Target groups: The workshop is aimed at all those involved in forestry, in particular in developing, planning and executing forest operations and management, as well as in teaching, training and extension work and in administrative and policy advisory services: Forest operations managers; Representatives of private and public forest enterprises; Officials of forest services and administrations; Scientists, teachers and trainers from universities, forestry schools, vocational training and extension centres; Representatives of non-governmental organisations, forestry associations and forest contractors; Representatives of decision-making bodies.

Title: **Seminar on close to nature forestry**

Date: 14-19 October 2003
Location: Zvolen, Slovakia
Objectives: In cooperation with EFI and IUFRO. The following topics will be considered: ecological, sylvicultural, operational and socio-economic aspects as well as the implications on forest policy development.

Target groups: The workshop is aimed at all those involved in forestry, in particular forest policy makers, forest service officials, forest managers, environmental and other non-governmental organizations, representatives of local governments and researchers and educators.

III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

Timber Bulletin	ECE/TIM/BULL/xx/x
Timber and Forest Study Papers	ECE/TIM/SP/x
Timber and Forest Discussion Papers	ECE/TIM/DP/x
Timber and Forest Information Series	ECE/TIM/INF/x
Timber and Forest Seminar and Workshop Proceedings	no symbol

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination), prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The contents of the ***Timber Bulletin*** in 2002 are set out in the bibliography.

The ***Timber and Forest Study Papers*** are composed of the European Forest Sector Outlook Studies (EFSOS), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, and other special studies. The ***Timber and Forest Discussion Papers*** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time. Unlike the ***Timber Bulletin*** and the ***Study Papers***, the ***Discussion Papers*** have limited input from the secretariat and are published in their original language. ***Timber and Forest Seminar and Workshop Proceedings*** are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code. Finally, the ***Timber and Forest Information Series*** which consists of this ***Timber Committee Yearbook***, plus ***Facts about*** ... the Committee and its two subsidiary bodies, which presents background information and activities of each of these bodies. A comprehensive list of publications appears at the back of this ***Yearbook***.

Issues of the ***Timber Bulletin*** are available on subscription (see below). Unless otherwise indicated, other documents are available on request, free of charge from the secretariat, while stocks last. Set out below are bibliographical references to those documents issued under the Committee's auspices in 2002, the **documents are described under the same headings as the text of the *Yearbook***. Further information may be obtained from the Timber Branch secretariat (see address on page ii).

1. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION

International dialogue on forests, support to the global and regional processes (TIM/2002/4)

2. FOREST POLICY AND INSTITUTIONS

Report of the FAO European Forestry Commission thirty-first session (FO:EFC/2002/REP)

Forest Policies and Institutions in Europe 1998-2000 (FO:EFC/2002/4)

3. FOREST RESOURCE ASSESSMENT

Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand (ECE/TIM/SP/17)
UNECE/FAO Team of specialists on forest resources assessment (TIM/2002/6)

4. EUROPEAN FOREST SECTOR OUTLOOK STUDIES

European Forest Sector Outlook Studies (EFSOS): progress report, plans for the next two years (TIM/2002/6)

Forecasts of the Economic Growth in OECD countries and central and eastern European countries for the period 2000-2040, a study prepared for the European Forest Sector Outlook Studies-EFSOS (ECE/TIM/DP/24)

Russian Federation Forest Sector Outlook Study (ECE/TIM/DP/26)

5. FOREST PRODUCTS MARKETS

Timber Bulletin Forest Products Annual Market Review, 2001-2002 (ECE/TIM/BULL/55/4)

The contents of other issues of the ***Timber Bulletin*** in 2002, (Vol. LV) is set out on page 20 below.

RELEVANT FAO STATISTICAL PUBLICATIONS

(Available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 2001

6. FOREST TECHNOLOGY, MANAGEMENT AND TRAINING

Report of the twenty-fourth session of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, Geneva (TIM/EFC/WP.2/2002)

7. PARTNERSHIPS IN FORESTRY

Report of the seminar (TIM/EFC/WP.1/SEM.53/2002/2)

8. AFFORESTATION IN THE CONTEXT OF SUSTAINABLE FOREST MANAGEMENT

Report of the workshop (TIM/EFC/WP.1/SEM.54/2002/2)

9. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE TECHNICAL EXCURSION TO THE FEDERAL REPUBLIC OF GERMANY

Recommendations of the Debe Workshop on Countries in Transition (TIM 2002 6/Add.1)

Report on the implementation of resolution H3

The H3 database in ACCESS format is periodically updated and posted at the Timber Committee website

Forest and forest products country profiles

Forest and Forest Products: Country Profile: Georgia (ECE/TIM/DP/26)

10. ECE/FAO FOREST COMMUNICATORS NETWORK

Report FAO/ECE Forest Communicators Network meeting, 6-9 May 2002, Riga, Latvia (TIM/2002/6/Add.6)

11. FOREST CERTIFICATION IN THE UNECE REGION

Forest Certification update for the UNECE region, summer 2002 (ECE/TIM/DP/25)

IV. LIST OF MEETINGS IN 2003 AND 2004

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of ECE was well as from other countries that are members of the United Nations and organizations accredited to ECE (or to FAO and ILO, in the case of meetings co-sponsored by them). Meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists. At the Committee's website (http://unece.org/trade/timber) an up-to-date calendar of meetings, can be consulted

2003

Dates	Location	Title
24-26 February	Geneva	Joint ECE/FAO Working Party on Forest Economics and Statistics, 25th session (A)
4-6 March	Geneva	ECE Timber Committee and FAO European Forestry Commission joint bureaux meeting (B)
24-27 March	Poiana Brasov, Romania	Seminar on strategies for the sound use of wood (A)
14-16 April	Geneva	European Forest Sector Outlook Studies (EFSOS) Team of Specialists (B)
15-19 April	Antalya, Turkey	FAO/ECE/ILO Conference on Forest Fire Management and International Cooperation in Fire Emergencies in the Eastern Mediterranean, Balkans and Adjoining Regions of the Near East and Central Asia (A)
May (to be decided)	Portugal	Joint ECE Timber Committee, FAO European Forestry Commission technical excursion (A)
9-14 September	Logarska Salma, Slovenia	FAO/ECE/ILO Seminar on forest operations improvements in farm forests (A)
6 October	Geneva	Meeting of the ECE/FAO team of specialists on forest products markets and marketing (B)
7-10 October	Geneva	ECE TIMBER COMMITTEE, 61st session (A)
12-13 October	Zvolen, Slovakia	Steering Committee of the Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training, 16th session (B)
14-19 October	Zvolen, Slovakia	FAO/ECE/ILO Seminar on close to nature forestry (A)

2004

Dates	Location	Title
March (to be decided)	Geneva	Joint ECE-FAO Working Party on Forest Economics and Statistics, 26th session (A)
May (to be decided)	Geneva	ECE Timber Committee and FAO European Forestry Commission joint bureaux meeting (B)
September (to be decided)	Netherlands	FAO ECE ILO Seminar on new roles and modes of operation of Forest Services (A)
September (to be decided)	Netherlands	Joint FAO ECE ILO Committee on Forest Technology, Management and Training, 25th session (A)
September (to be decided)	Geneva	Meeting of the ECE-FAO team of specialists on forest products markets and marketing (B)
September (to be decided)	Geneva	Joint session ECE TIMBER COMMITTEE, 62nd session and FAO European Forestry Commission, thirty-second session (A)
October (to be decided)	Sochi Russian Federation (to be confirmed)	FAO ECE ILO Seminar on multi-functional forestry in protected and vulnerable area (A)
(to be decided)	Hungary (to be confirmed)	FAO ECE ILO Seminar Environmentally sound forest roads and wood transport (A)
(to be decided)	Sweden (to be determined)	FAO ECE ILO Seminar on biodiversity from concept to practice (A)

SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe), based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;

4. Carry out tasks identified by the UNECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimizing the use of resources.

More information about the Committee's work may be obtained by writing to:

Timber Branch
UNECE Trade Development and Timber Division
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041
E-mail: info.timber@unece.org
Web site address: http://www.unece.org/trade/timber

UNECE/FAO Publications

Timber Bulletin Volume LV (2002) ECE/TIM/BULL/2002/...

1. Forest Products Prices, 1998-2000
2. Forest Products Statistics, 1997-2001 (database since 1964 on website)
3. Forest Products Annual Market Review, 2001-2002
4. Forest Fire Statistics, 1999-2001
5. Forest Products Trade Flow Data, 1999-2000
6. Forest Products Markets in 2002 and Prospects for 2003

Geneva Timber and Forest Study Papers

Forest policies and institutions of Europe, 1998-2000	ECE/TIM/SP/19
Forest and Forest Products Country Profile: Russian Federation	ECE/TIM/SP/18
(Country profiles also exist on Albania, Armenia, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Hungary, Lithuania, Poland, Romania, Republic of Moldova, Slovenia and Ukraine)	
Forest resources of Europe, CIS, North America, Australia, Japan and New Zealand	ECE/TIM/SP/17
State of European forests and forestry, 1999	ECE/TIM/SP/16
Non-wood goods and services of the forest	ECE/TIM/SP/15

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Forestry Cooperation with Countries in Transition	ECE/TIM/DP/28
Russian Federation Forest Sector Outlook Study	ECE/TIM/DP/27
Forest and Forest Products Country Profile: Georgia	ECE/TIM/DP/26
Forest certification update for the UNECE region, summer 2002	ECE/TIM/DP/25
Forecasts of economic growth in OECD and central and eastern European countries for the period 2000-2040	ECE/TIM/DP/24
Forest Certification update for the ECE Region, summer 2001	ECE/TIM/DP/23
Structural, Compositional and Functional Aspects of Forest Biodiversity in Europe	ECE/TIM/DP/22
Markets for secondary processed wood products, 1990-2000	ECE/TIM/DP/21
Forest certification update for the ECE Region, summer 2000	ECE/TIM/DP/20
Trade and environment issues in the forest and forest products sector	ECE/TIM/DP/19
Multiple use forestry	ECE/TIM/DP/18
Forest certification update for the ECE Region, summer 1999	ECE/TIM/DP/17
A summary of "The competitive climate for wood products and paper packaging: the factors causing substitution with emphasis on environmental promotions"	ECE/TIM/DP/16
Recycling, energy and market interactions	ECE/TIM/DP/15
The status of forest certification in the ECE region	ECE/TIM/DP/14
The role of women on forest properties in Haute-Savoie (France): Initial researches	ECE/TIM/DP/13
Interim report on the Implementation of Resolution H3 of the Helsinki Ministerial Conference on the protection of forests in Europe (Results of the second enquiry)	ECE/TIM/DP/12
Manual on acute forest damage	ECE/TIM/DP/7

International Forest Fire News *(two issues per year)*

Timber and Forest Information Series

Timber Committee Yearbook 2003	ECE/TIM/INF/10

The above series of publications may be requested free of charge through:
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Printed at United Nations, Geneva
GE.03-20724 March 2003–2,065

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